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7 UNITED STATES DISTRICT COURT  
8 WESTERN DISTRICT OF WASHINGTON  
9 AT SEATTLE

10 UNITED BROTHERHOOD OF  
11 CARPENTERS AND JOINERS OF  
12 AMERICA, et al,

13 Plaintiffs,

14 v.

15 EVELYN SHAPIRO,

16 Defendant.  
17

CASE NO. 2:22-cv-01099-JHC

**STIPULATED  
PROTECTIVE ORDER**

18 1. PURPOSES AND LIMITATIONS

19 Discovery in this action is likely to involve production of confidential, proprietary, or  
20 private information for which special protection may be warranted. Accordingly, the parties hereby  
21 stipulate to and petition the court to enter the following Stipulated Protective Order. The parties  
22 acknowledge that this agreement is consistent with LCR 26(c). It does not confer blanket  
23 protection on all disclosures or responses to discovery, the protection it affords from public  
24 disclosure and use extends only to the limited information or items that are entitled to confidential  
25 treatment under the applicable legal principles, and it does not presumptively entitle parties to file  
26 confidential information under seal.

2. “CONFIDENTIAL” MATERIAL

“Confidential” material shall include the following documents and tangible things produced or otherwise exchanged:

- a. financial information that is not typically publicly available including but not limited to bank records of any kind; profit and loss statements; tax returns, tax statements, or other tax records; budgets or proposed budgets; investment account reports, statements; credit accounts, statements; loan agreements; and other documents with the same or substantially the same financial information pertaining to each party that is not public;
- b. any individual’s social security number, date of birth, home address, or personal phone number, including cell phone number;
- c. any party’s bank account number;
- d. documents with trade secrets, as “trade secrets” are defined under RCW 19.108.010(4) and the associated common law; and/or
- e. “confidential ... commercial information” under Rule 26(c)(1)(G) of the Federal Rules of Civil Procedure.

3. SCOPE

The protections conferred by this agreement cover not only confidential material (as defined above), but also (1) any information copied or extracted from confidential material; (2) all copies, excerpts, summaries, or compilations of confidential material; and (3) any testimony, conversations, or presentations by parties or their counsel that might reveal confidential material.

However, the protections conferred by this agreement do not cover information that is in the public domain lawfully or becomes part of the public domain through trial or otherwise through no violation of this agreement.

4. ACCESS TO AND USE OF CONFIDENTIAL MATERIAL

4.1 Basic Principles. A receiving party may use confidential material that is disclosed or produced by another party or by a non-party in connection with this case only for prosecuting,

1 defending, or attempting to settle this litigation. Confidential material may be disclosed only to the  
2 categories of persons and under the conditions described in this agreement. Confidential material  
3 must be stored and maintained by a receiving party at a location and in a secure manner that ensures  
4 that access is limited to the persons authorized under this agreement.

5 4.2 Disclosure of “CONFIDENTIAL” Information or Items. Unless otherwise ordered  
6 by the court or permitted in writing by the designating party, a receiving party may disclose any  
7 confidential material only to:

8 (a) the receiving party’s counsel of record in this action, as well as employees  
9 of counsel to whom it is reasonably necessary to disclose the information for this litigation;

10 (b) the officers, directors, and employees (including in house counsel) of the  
11 receiving party to whom disclosure is reasonably necessary for this litigation, unless the parties  
12 agree that a particular document or material produced is for Attorney’s Eyes Only and is so  
13 designated;

14 (c) experts and consultants to whom disclosure is reasonably necessary for this  
15 litigation and who have signed the “Acknowledgment and Agreement to Be Bound” (Exhibit A);

16 (d) the court, court personnel, court reporters and videographers and their staff;

17 (e) copy or imaging services retained by counsel to assist in the duplication of  
18 confidential material, provided that counsel for the party retaining the copy or imaging service  
19 instructs the service not to disclose any confidential material to third parties and to immediately  
20 return all originals and copies of any confidential material;

21 (f) during their depositions, witnesses in the action to whom disclosure is  
22 reasonably necessary and who have signed the “Acknowledgment and Agreement to Be Bound”  
23 (Exhibit A), unless otherwise agreed by the designating party or ordered by the court. Pages of  
24 transcribed deposition testimony or exhibits to depositions that reveal confidential material must  
25 be separately bound by the court reporter and may not be disclosed to anyone except as permitted  
26 under this agreement;

1 (g) the author or recipient of a document containing the information or a  
2 custodian or other person who otherwise possessed or knew the information.

3 4.3 Filing Confidential Material. Before filing confidential material or discussing or  
4 referencing such material in court filings, the filing party shall confer with the designating party,  
5 in accordance with Local Civil Rule 5(g)(3)(A), to determine whether the designating party will  
6 remove the confidential designation, whether the document can be redacted, or whether a motion  
7 to seal or stipulation and proposed order is warranted. During the meet and confer process, the  
8 designating party must identify the basis for sealing the specific confidential information at issue,  
9 and the filing party shall include this basis in its motion to seal, along with any objection to sealing  
10 the information at issue. Local Civil Rule 5(g) sets forth the procedures that must be followed and  
11 the standards that will be applied when a party seeks permission from the court to file material  
12 under seal. A party who seeks to maintain the confidentiality of its information must satisfy the  
13 requirements of Local Civil Rule 5(g)(3)(B), even if it is not the party filing the motion to seal.  
14 Failure to satisfy this requirement will result in the motion to seal being denied, in accordance with  
15 the strong presumption of public access to the Court's files.

16 5. DESIGNATING PROTECTED MATERIAL

17 5.1 Exercise of Restraint and Care in Designating Material for Protection. Each party  
18 or non-party that designates information or items for protection under this agreement must take  
19 care to limit any such designation to specific material that qualifies under the appropriate  
20 standards. The designating party must designate for protection only those parts of material,  
21 documents, items, or oral or written communications that qualify, so that other portions of the  
22 material, documents, items, or communications for which protection is not warranted are not swept  
23 unjustifiably within the ambit of this agreement.

24 Mass, indiscriminate, or routinized designations are prohibited. Designations that are  
25 shown to be clearly unjustified or that have been made for an improper purpose (*e.g.*, to  
26

unnecessarily encumber or delay the case development process or to impose unnecessary expenses and burdens on other parties) expose the designating party to sanctions.

If it comes to a designating party's attention that information or items that it designated for protection do not qualify for protection, the designating party must promptly notify all other parties that it is withdrawing the mistaken designation.

5.2 Manner and Timing of Designations. Except as otherwise provided in this agreement (see, *e.g.*, second paragraph of section 5.2(b) below), or as otherwise stipulated or ordered, disclosure or discovery material that qualifies for protection under this agreement must be clearly so designated before or when the material is disclosed or produced.

(a) Information in documentary form: (*e.g.*, paper or electronic documents and deposition exhibits, but excluding transcripts of depositions or other pretrial or trial proceedings), the designating party must affix the word "CONFIDENTIAL" to each page that contains confidential material. If only a portion or portions of the material on a page qualifies for protection, the producing party also must clearly identify the protected portion(s) (*e.g.*, by making appropriate markings in the margins).

(b) Testimony given in deposition or in other pretrial proceedings: the parties and any participating non-parties must identify on the record, during the deposition or other pretrial proceeding, all protected testimony, without prejudice to their right to so designate other testimony after reviewing the transcript. Any party or non-party may, within fifteen days after receiving the transcript of the deposition or other pretrial proceeding, designate portions of the transcript, or exhibits thereto, as confidential. If a party or non-party desires to protect confidential information at trial, the issue should be addressed during the pre-trial conference.

(c) Other tangible items: the producing party must affix in a prominent place on the exterior of the container or containers in which the information or item is stored the word "CONFIDENTIAL." If only a portion or portions of the information or item warrant protection, the producing party, to the extent practicable, shall identify the protected portion(s).

1           5.3     Inadvertent Failures to Designate. If timely corrected, an inadvertent failure to  
2 designate qualified information or items as “CONFIDENTIAL” does not, standing alone, waive  
3 the designating party’s right to secure protection under this agreement for such material. Upon  
4 timely correction of a designation, the receiving party must make reasonable efforts to ensure that  
5 the material is treated in accordance with the provisions of this agreement.

6     6.     CHALLENGING CONFIDENTIALITY DESIGNATIONS

7           6.1     Timing of Challenges. Any party or non-party may challenge a designation of  
8 confidentiality at any time. Unless a prompt challenge to a designating party’s confidentiality  
9 designation is necessary to avoid foreseeable, substantial unfairness, unnecessary economic  
10 burdens, or a significant disruption or delay of the litigation, a party does not waive its right to  
11 challenge a confidentiality designation by electing not to mount a challenge promptly after the  
12 original designation is disclosed.

13          6.2     Meet and Confer. The parties must make every attempt to resolve any dispute  
14 regarding confidential designations without court involvement. Any motion regarding confidential  
15 designations or for a protective order must include a certification, in the motion or in a declaration  
16 or affidavit, that the movant has engaged in a good faith meet and confer conference with other  
17 affected parties in an effort to resolve the dispute without court action. The certification must list  
18 the date, manner, and participants to the conference. A good faith effort to confer requires a face-  
19 to-face meeting or a telephone conference.

20          6.3     Judicial Intervention. If the parties cannot resolve a challenge without court  
21 intervention, the designating party may file and serve a motion to retain confidentiality under Local  
22 Civil Rule 7 (and in compliance with Local Civil Rule 5(g), if applicable). The burden of  
23 persuasion in any such motion shall be on the designating party. Frivolous challenges, and those  
24 made for an improper purpose (*e.g.*, to harass or impose unnecessary expenses and burdens on  
25 other parties) may expose the challenging party to sanctions. All parties shall continue to maintain  
26 the material in question as confidential until the court rules on the challenge.

7. PROTECTED MATERIAL SUBPOENAED OR ORDERED PRODUCED IN OTHER LITIGATION

If a party is served with a discovery request, subpoena, or a court order issued in other litigation that compels disclosure of any information or items designated in this action as “CONFIDENTIAL,” that party must:

(a) promptly notify the designating party in writing and include a copy of the subpoena or court order;

(b) promptly notify in writing the party who caused the subpoena or order to issue in the other litigation that some or all of the material covered by the subpoena or order is subject to this agreement. Such notification shall include a copy of this agreement; and

(c) cooperate with respect to all reasonable procedures sought to be pursued by the designating party whose confidential material may be affected.

8. UNAUTHORIZED DISCLOSURE OF PROTECTED MATERIAL

If a receiving party learns that, by inadvertence or otherwise, it has disclosed confidential material to any person or in any circumstance not authorized under this agreement, the receiving party must immediately (a) notify in writing the designating party of the unauthorized disclosures, (b) use its best efforts to retrieve all unauthorized copies of the protected material, (c) inform the person or persons to whom unauthorized disclosures were made of all the terms of this agreement, and (d) request that such person or persons execute the “Acknowledgment and Agreement to Be Bound” that is attached hereto as Exhibit A.

9. INADVERTENT PRODUCTION OF PRIVILEGED OR OTHERWISE PROTECTED MATERIAL

When a producing party gives notice to receiving parties that certain inadvertently produced material is subject to a claim of privilege or other protection, the obligations of the receiving parties are those set forth in Federal Rule of Civil Procedure 26(b)(5)(B). This provision is not intended to modify whatever procedure may be established in an e-discovery order or

1 agreement that provides for production without prior privilege review. The parties agree to the  
 2 entry of a non-waiver order under Fed. R. Evid. 502(d) as set forth herein.

3 10. NON TERMINATION AND RETURN OF DOCUMENTS

4 Within 60 days after the termination of this action, including all appeals, each receiving  
 5 party must either return all confidential material to the producing party, including all copies,  
 6 extracts and summaries thereof, or alternatively, destroy such confidential material, including all  
 7 copies, extracts and summaries thereof. Whether the confidential material is returned or destroyed,  
 8 the receiving party may be asked to submit a written certification to the producing party (and, if  
 9 not the same person or entity, to the designating party) that affirms that (1) all of the confidential  
 10 material was returned or destroyed in accordance with this agreement and (2) the receiving party  
 11 has not retained any copies, abstracts, compilations, summaries or other forms of reproducing or  
 12 capturing any of the confidential material, except as expressly permitted herein. If requested, such  
 13 a certificate shall be provided within 14 days of the request.

14 Notwithstanding this provision, counsel are entitled to retain one archival copy of all  
 15 documents filed with the court, trial, deposition, and hearing transcripts, correspondence,  
 16 deposition and trial exhibits, expert reports, attorney work product, and consultant and expert work  
 17 product, even if such materials contain confidential material.

18 The confidentiality obligations imposed by this agreement shall remain in effect until a  
 19 designating party agrees otherwise in writing or a court orders otherwise.

20  
 21 IT IS SO STIPULATED, THROUGH COUNSEL OF RECORD.

22 DATED: October 26, 2022

/s/ Daniel M. Shanley  
 Daniel M. Shanley  
 SHANLEY APC  
 Attorney for Plaintiffs

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 25 DATED: October 26, 2022

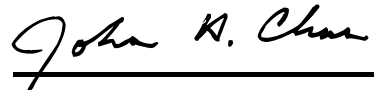
/s/ Joan K. Mell  
 Joan K. Mell  
 Attorney for Defendant Evelyn Shapiro



1 PURSUANT TO STIPULATION, IT IS SO ORDERED

2 IT IS FURTHER ORDERED that pursuant to Fed. R. Evid. 502(d), the production of any  
3 documents in this proceeding shall not, for the purposes of this proceeding or any other federal or  
4 state proceeding, constitute a waiver by the producing party of any privilege applicable to those  
5 documents, including the attorney-client privilege, attorney work-product protection, or any other  
6 privilege or protection recognized by law.

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8 DATED: October 26, 2022  
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11 John H. Chun  
12 United States District Judge  
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**EXHIBIT A**

**ACKNOWLEDGMENT AND AGREEMENT TO BE BOUND**

I, \_\_\_\_\_ [print or type full name], of  
 \_\_\_\_\_ [print or type full address], declare under penalty of  
 perjury that I have read in its entirety and understand the Stipulated Protective Order that was  
 issued by the United States District Court for the Western District of Washington on [date] in the  
 case of *Gleason v. Orth*, Case No. 2:22-cv-00305-JHC. I agree to comply with and to be bound by  
 all the terms of this Stipulated Protective Order and I understand and acknowledge that failure to  
 so comply could expose me to sanctions and punishment in the nature of contempt. I solemnly  
 promise that I will not disclose in any manner any information or item that is subject to this  
 Stipulated Protective Order to any person or entity except in strict compliance with the provisions  
 of this Order.

I further agree to submit to the jurisdiction of the United States District Court for the  
 Western District of Washington for the purpose of enforcing the terms of this Stipulated Protective  
 Order, even if such enforcement proceedings occur after termination of this action.

Date: \_\_\_\_\_

City and State where sworn and signed: \_\_\_\_\_

Printed name: \_\_\_\_\_

Signature: \_\_\_\_\_

**CERTIFICATE OF SERVICE**

I hereby certify that on October 26, 2022, I electronically filed the foregoing document with the Clerk of the Court using the CM/ECF system, which will send notification of such filing to the attorneys of record for the parties.

Dated this 26th day of October, 2022.

/s/ Daniel M. Shanley

Daniel M. Shanley, WSBA #41253